

WORKFORCE OBSERVATIONS FOR SOUTH CENTRAL WISCONSIN COUNTIES

April 2003



Strong recovery still on hold; separately, per capita personal income estimates released.

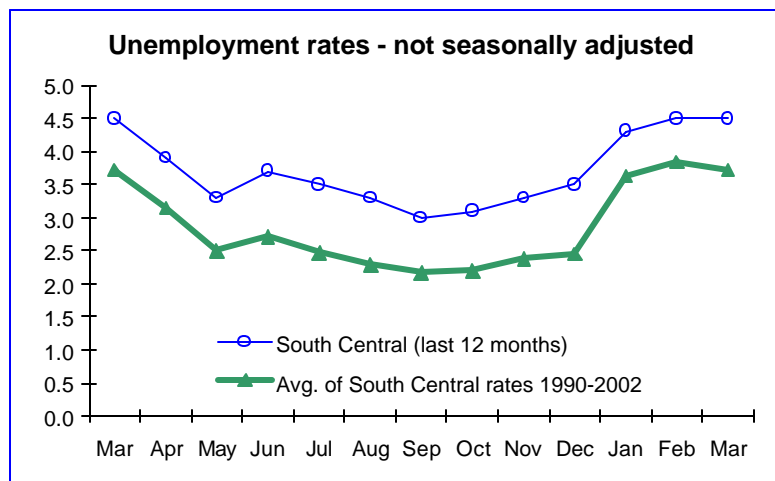
During March, unemployment rates usually start to ease in the United States, in Wisconsin and in the South Central region of Wisconsin. The nation followed a relatively typical seasonal pattern, with unemployment rates falling slightly as spring began in earnest, but rates remained above their typical levels. Although individual South Central Wisconsin counties saw unemployment rate changes, the region's aggregate unemployment rate did not change from February to March. (See graph to right.) The gap between current unemployment rates and "average" rates shrank in January and February, but rose again in March.

Adding jobs in most sectors, **Columbia County** saw its unemployment rate dip. Appearing to buck national trends, information, professional, business and other services reported strong job growth. Leisure and hospitality, the only sector posting job losses in Columbia County this month, still reported many more jobs this March than last. Manufacturing would have had to nearly double its March job growth just to have as many jobs as it had last March.

In **Dane County**, the leisure and hospitality sector posted the second-highest one-month growth rate in the last year. Summer months will tell much more about the state of the industry. Stronger-than-usual retail trade job gains are a welcome sign. As recently as January, the retail sector had over 2,000 fewer jobs in 2003 than it had had during the same month in 2002. By March, the gap shrank to 600. Confounding state and national trends, the county's manufacturing sector has added jobs during nine of the last thirteen months.

Rising 0.1 percent during a month when a drop of 0.2 percent would be more typical, **Dodge County's** unemployment rate remains exactly where it was last March: nearly 0.2 percent above its typical levels. February-to-March job gains in leisure & hospitality and in information, professional, business and

other services were not enough to compensate for job losses over the last twelve months in manufacturing, trade, and information, professional, business and other services. Manufacturing job losses in October cancelled June-through-September gains.



Labor force estimates - not seasonally adjusted

	Wisconsin			South Central			Columbia			Dane		
	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change
Civilian Labor Force**	3,083,200	2,000	68,400	449,600	1,820	12,200	28,800	290	1,000	287,400	640	9,000
Employed	2,883,500	1,220	70,400	429,400	1,560	11,700	26,600	300	900	278,300	410	8,700
Unemployed	199,700	780	-2,040	20,200	260	490	2,300	-10	100	9,000	230	330
Unemployment rate (%)	6.5	0.0	-0.2	4.5	0.0	0.0	7.9	-0.1	0.1	3.1	0.0	0.0

	Dodge			Jefferson			Marquette			Sauk		
	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change
Civilian Labor Force**	46,300	190	300	42,800	300	420	7,800	80	300	36,500	310	1,230
Employed	43,000	110	280	40,300	350	410	6,900	80	230	34,300	300	1,260
Unemployed	3,300	80	20	2,500	-50	10	880	0	60	2,200	10	-30
Unemployment rate (%)	7.2	0.1	0.0	5.9	-0.1	0.0	11.4	-0.1	0.4	6.0	0.0	-0.2

** Includes labor force participants residing in area. Estimates are NOT seasonally adjusted. Current month estimates are preliminary. Numbers 2,000 and greater are rounded to nearest 100. Numbers under 2,000 are rounded to nearest 10. Sub-units may not add to totals due to rounding. Calculations are based on unrounded numbers. Results are rounded. For more information call (608) 242-4885 or email dan.barroilhet@dwd.state.wi.us.

In **Jefferson County**, roughly 470 meat processing workers are on strike and this causes the labor force estimates (see table and graph, page one) to tell a different story than the employment by industry estimates (below). The labor force estimates assume that striking workers remain employed because their employment has not been terminated. This allowed the unemployment rate to drop by a tenth of a percentage point. Striking workers do not show up on the employer's payroll, so the employment by industry estimates reflect the work stoppage (particularly in the manufacturing sector, which appears stable aside from this strike). The leisure and hospitality industry, which has stagnated or lost jobs each month since August, is starting to add jobs. No industry has posted greater numerical job growth or faster proportional job growth in 1-month terms (comparing February to March) or in 12-month terms (comparing this March to last March). Even if the striking workers were still on the job, manufacturing would have suffered greater numerical job losses from March 2002 to March 2003 and lost a greater proportion of its jobs (over the same period) than any other sector.

March 1994 was the only time in at least thirteen years that **Marquette County's** March unemployment rate has been this high. The March rate is actually lower than the February rate was, but is nearly half a percent higher than the rate for last March. The change from February appears to be driven by modest gains in leisure and hospitality, construction and transportation, warehousing and utilities. Bucking trends seen elsewhere, manufacturing posted more jobs this March than last

March. Trade and leisure and hospitality were the only other sectors to post significant 12-month job gains.

Instead of falling, as it typically does, **Sauk County's** unemployment rate held steady in March. This was the third month in a row when Sauk was the only South Central county to be below trend rates, but it was less so in March than in January or February. Financial activities was the only sector to lose jobs between February and March. Construction started picking up, as it typically does in spring. The addition of leisure and hospitality jobs is at least partially seasonal, but some cyclical growth can be seen in the fact the sector reported 1,880 more jobs this March than last. The 50 jobs added in information, business, professional and other services still leave Sauk County with 530 fewer jobs in the sector than there were last March. The last large changes in this sector were September through November of last year, during which time 850 jobs were lost. From December through March, it has regained 40 of those jobs. Manufacturing still hasn't recovered from significant job losses last April and October. The trade sector usually peaks in the summer and wanes in the winter, so the coming months should tell us more about the state Sauk County's trade sector.

Per capita personal income estimates

On May 6, the Bureau of Economic Analysis released new per capita personal income estimates. These include estimates of each county's total income and income by source. For more information contact Dan Barroilhet at (608) 242-4885 or email Dan.Barroilhet@dwd.state.wi.us.

Employment by industry estimates - not seasonally adjusted												
	Wisconsin			South Central			Columbia			Dane		
	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change
Total jobs, all industries*	2,741,800	9,700	5,900	422,400	2,500	2,800	20,900	240	230	295,800	1,900	3,200
Const., min'g & nat. resources	105,500	800	-5,800	18,100	150	-610	1,020	40	60	12,400	0	-700
Manufacturing	514,900	-1,200	-12,400	60,800	-110	-230	4,800	60	-110	29,000	300	2,000
Trade (wholesale & retail)	422,300	200	-2,200	60,000	780	-800	3,100	60	-140	40,700	600	-300
Transport, Wrhsing, Utilities	104,600	900	1,700	10,800	140	-120	660	10	-20	7,100	100	600
Financial activities	152,900	200	1,200	28,400	20	390	580	10	20	24,800	100	500
Education & health services	363,600	1,200	10,600	43,500	60	940	2,600	30	10	28,600	0	800
Leisure & hospitality	226,600	3,000	4,100	39,000	1,050	2,900	2,200	-40	370	23,400	700	300
Info, prof. bus. & other svcs	425,200	2,900	8,700	66,700	120	1,140	1,970	60	-40	54,600	-100	2,000
Government	426,200	1,700	0	95,300	300	-850	4,000	30	80	75,200	200	-1,300
	Dodge			Jefferson			Marquette			Sauk		
	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change	Mar 2003	1-month change	1-year change
Total jobs, all industries*	32,300	90	-450	34,800	-90	-830	3,800	50	110	34,900	310	540
Const., min'g & nat. resources	1,890	-10	70	1,090	40	20	110	10	-30	1,580	60	-20
Manufacturing	10,200	-20	-740	9,300	-470	-950	1,300	0	90	6,300	30	-530
Trade (wholesale & retail)	3,800	10	-120	6,000	70	160	450	0	50	6,000	40	-440
Transport, Wrhsing, Utilities	990	10	-10	1,190	0	-20	60	10	0	770	20	30
Financial activities	700	-10	-30	940	0	30	110	0	0	1,250	-90	-120
Education & health services	4,200	0	250	4,500	50	-150	290	0	-10	3,300	-20	50
Leisure & hospitality	2,400	80	170	3,100	120	160	410	20	30	7,400	190	1,880
Info, prof. bus. & other svcs	2,700	30	-170	4,400	70	-80	230	0	-30	2,800	50	-530
Government	5,300	-20	130	4,300	50	20	840	0	10	5,600	40	220

*Includes jobs with employers in area. Estimates are **NOT** seasonally adjusted. Current month estimates are preliminary. Numbers 2,000 and greater are rounded to nearest 100. Numbers under 2,000 are rounded to nearest 10. Sub-units may not add to totals due to rounding. Calculations are based on unrounded numbers. Results are rounded. For more information call (608) 242-4885 or email dan.barroilhet@dwd.state.wi.us.